

PMS Scheme 0005 step by step guide for modifying an application

*Please see important information not to be missed outlined in red

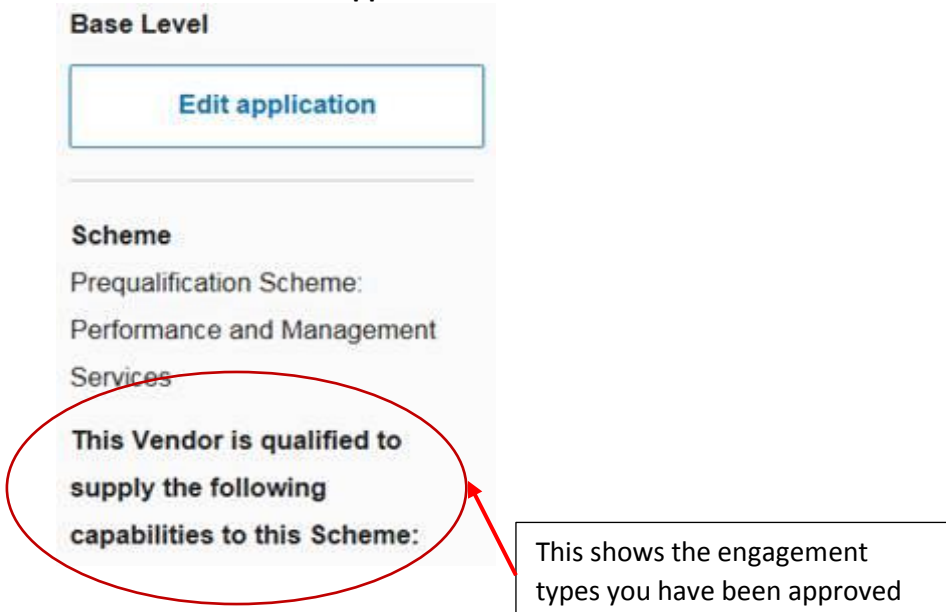
Any applications for additional engagement types will be rejected if they do not include the supporting documentation as outlined in the PMS Scheme Rules:

- Updated experience template
- Updated references (for Full applications) with experience in the additional engagement types recorded and approved
- Rate card for any engagement types in 14 and 15 categories
- Update Company Profile to include work experience in additional engagement types

For background information please review the [overview of the standard commercial framework](#) (PDF, 305 KB).

To update an application in [eTendering](#) please follow these steps. Log in to <https://tenders.nsw.gov.au/?event=public.login.form> with the scheme owner's email address

1. Select your name on the top right side to display the dropdown menu
2. Select **'Scheme Applications'**
3. Select **'View/Modify Application'**
4. Please take note of the engagement types you have been mapped to on the front page which will be located under the **'edit application'** button



Base Level

[Edit application](#)

Scheme

Prequalification Scheme:
Performance and Management
Services

This Vendor is qualified to supply the following capabilities to this Scheme:

This shows the engagement types you have been approved

5. Select **'Edit Application'**
6. Once you select **'Edit application'** you will be directed to this window:

Prequalification Scheme: Performance and Management Services - SCM0005

Who is applying?

On this screen you are identifying the entity who will, if successful reside on the scheme below.

Please confirm that you are applying for the correct scheme before proceeding.

- 1 Entity Detail 2 Office Detail 3 Prequalification 4 Questionnaire 5 Capabilities 6 Review

Scheme Documents

- Applicant Guidelines
- Standard Commercial Framework
- Engagement Types
- Organisational Experience Template
- Rate Card Template
- Applicant Referee Report Template

You can copy details from your Personal Profile or a previous lodgement.

7. Please review the **Scheme Documents** before progressing – in particular, click to review the:
- Standard Commercial Framework
 - Engagement Types

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8. Then go to section **(4) Questionnaire**:

9. This will take you to this screen:

Questionnaire

* Denotes mandatory fields

Organisation Details	Details provided	▼
Company Profile	Details provided	▼
C - Policy Areas	Details provided	▼
Insurances	Details provided	▼
Standard commercial framework	Details provided	▼
Organisational Experience	Details provided	▼
Applicant Validation	Details provided	▼


10. In this section, you must update the following sections:

Questionnaire

* Denotes mandatory fields

Organisation Details	Details provided	▼
Company Profile	Details provided	▼
C - Policy Areas	Details provided	▼
Insurances	Details provided	▼
Standard commercial framework	Details provided	▼
Organisational Experience	Details provided	▼
Applicant Validation	Details provided	▼

11. Answer all questions in the 'Organisation Details' section:

Organisation Details Details provided 

Additional details of your organisation.

1. Current Supplier *

Is your organisation registered on this scheme under a different ABN/entity?

Yes - If yes, please contact the service desk on 1800 679 289

No

2. Type of Organisation *

Please indicate your organisation type by selecting one of the following options.

Sole Trader

Registered (limited or proprietary limited company)

Partnership

Holding company

Foreign (overseas) company registered in Australia

An individual, partnership, or registered company that is a trustee, under certain circumstances.

Local, State or Federal Government Entity

3. Small Business *

Is your organisation a Small Business as defined in Treasury Circular TC11/12 Payment of Accounts - **"Small businesses** are Australian or New Zealand-based firms that have an annual turnover of under \$2 million in the latest financial year?"

https://www.treasury.nsw.gov.au/sites/default/files/pdf/TC11-12_Payment_of_Accounts.pdf

Yes

No

12. Answer all questions in the 'Standard Commercial Framework' section

- **Note – click on each PDF link below the question/answers to review what you are accepting/not accepting**

1. Engagement types *

Standard definitions apply to all engagement types.

Does your organisation accept the Engagement Types for relevant engagements under the PMS Scheme standard commercial framework?

I accept

I do not accept

[Engagement Types.pdf](#)

Please review

2. Resource Types *

Standard resource type definitions apply to engagement types 1 to 13.

Does your organisation accept the Resource Types for relevant engagements under the PMS Scheme standard commercial framework?

- I accept
- I do not accept
- My organisation does not offer any of the engagement types 1-13

Please review, then answer

[Resource Types.pdf](#)

3. Capped Resource Rates *

Capped resource rates represent the maximum rates chargeable for engagement types 1-13.

Does your organisation accept the Capped Resource Rates for relevant engagements under the PMS Scheme standard commercial framework?

- I accept
- I do not accept
- My organisation does not offer any of the engagement types 1-13

Please review, then answer

[Capped Rates.pdf](#)

4. Capped Expenses *

The framework limits the expenses suppliers may submit, to a maximum value of 7% of the engagement fee.

- I agree
- I do not agree
- My organisation does not offer any of the engagement types 1-13

Please review, then answer

[Capped Expenses.pdf](#)

5. Discount Structure *

A discount structure will be applied to daily rates based on project duration and team size.

Does your organisation accept the Discount Structure for relevant engagements under the PMS Scheme standard commercial framework?

- I accept
- I do not accept
- My organisation does not offer any of the engagement types 1-13

Please review, then answer

[Discount Structure.pdf](#)

6. Daily Rates

If your engagement types include 14 (Specialised Services) or 15 (Infrastructure), you are required to provide your daily rates in the requested format.

Daily Rates

Please use the attached spreadsheet to provide daily rates for type of service and personnel

Response File

Date

The 'Response File' template is available just below the date field. Save the template. Update with your answers (**file name has to be different than before if a previous file has been uploaded**). Then Browse > Select the file > **Continue to next page and this will attach to the system.**

13. Answer all questions in 'Applicant Validation':

Applicant Validation	Details provided	^
Authorised Representative		
1. Legal Proceedings / ICAC Investigations *		
Are you or any of your directors or close associates currently, or have you, or have your directors or close associates been at any time within the last 5 years, the subject of any or any pending:		
(a) legal proceedings, including winding up or bankruptcy proceedings,		
(b) insolvency administrations or investigations; and/or		
(c) investigations by ICAC or any other public body?		
<input type="radio"/> Yes		
<input type="radio"/> No		
2. Details - Legal Proceedings / ICAC Investigations		
If you answered 'Yes' to the previous question, please provide details below.		
<div style="border: 1px solid #ccc; height: 60px;"></div>		
3. Termination *		
Have you ever had a contract terminated for cause by an agency, including poor performance or due to investigations for wrongful behaviour?		
<div style="border: 1px solid #ccc; height: 60px;"></div>		
4. Applicant Declaration *		
I am authorised to submit this application for and on behalf of the applicant and in doing so warrant that it is financially solvent and the information provided is true and correct.		
<input checked="" type="checkbox"/> Confirmation of authorised representative		
5. The applicant declaration is confirmed by the applicant's authorised representative. *		
Please provide full name, contact telephone number and email address of the applicant's authorised representative		
<div style="border: 1px solid #ccc; height: 60px;"></div>		

14. ENGAGEMENT TYPES – If applying for additional you DO NEED the required supporting documentation (referee reports are only required for Full prequalification)

Company Profile

Company profile of your organisation.

1. Company Profile *

Please provide your company profile as an attachment. Include any information that you think is necessary to highlight the nature of your core business and company structure. Applicants should ensure that the company profile provides the following information, as a minimum

Details of all key personnel experience and qualifications;

A clear and concise description of the key professional services offered by your organisation.

This should include any professional memberships, groups and industry associations, etc.

Response File

Organisational Experience



Please provide details of your business experience in your nominated engagement types. If your organisation is new and has no corporate history you may include details of the experience of principal consultants within your organisation. Experience within Australia and overseas is relevant however the resource(s) must be available to provide services in NSW.

Some highly specialised capabilities may require additional information. Please check the Scheme Rules (Term and Conditions) and the engagement type descriptions for further details on these requirements.

1. Organisational Experience *

Please use the attached template to provide details of at least three (3) professional service engagements your organisation has completed in the last three (3) years that relate to your nominated engagement types.

Your example engagements must describe the actual services your organisation provided, and relate to the engagement types you are applying for.

For each engagement, list the fee paid for the works that your organisation completed – not the total value of the entire works program.

Response File

[Experience Template 310518.docx](#) - Organisational Experience Template

Applicant Referee Reports



Referee reports are used to assess whether the applicant has demonstrated experience within the nominated engagement.

- Applicants are required to provide at least three (3) referee reports completed and signed by the referee.
- Engagements should have been completed in the last three years, ongoing engagements will be considered on a case by case basis.
- Referee reports should directly relate to the nominated engagement types.
- The reference can relate to the referee's experience with the Applicant or its principal consultants and may include more than one engagement.
- Where the Applicant was employed as a public servant in the last 24 months, relevant work-related referees can be provided to satisfy this requirement.

Please Note: The current version of the *Applicant Referee Report* template must be used for each referee. The current template can be downloaded below.

We may contact the referees to verify or clarify any aspect of the Applicant Referee Reports.

The engaging agency may also contact these, or other referees relevant to a particular engagement.

1. Referee Report (1) *

Please use the attached template to provide your Referee Report (1).

Response File

[Applicant Referee Report 040618.docx](#) - Applicant Referee Report Template

6. Daily Rates

If your engagement types include 14 (Specialised Services) or 15 (Infrastructure), you are required to provide your daily rates in the requested format.

Daily Rates

Please use the attached spreadsheet to provide daily rates for type of service and personnel.

Response File

[Rate Card 310518.xlsx](#) - Rate Card Template

15. Once you have responded to these areas, please go to the last option **(6) Review** (see below):

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16. You will can now submit the application update – **PLEASE SELECT 'SUBMIT'**

- Do not choose save and exit